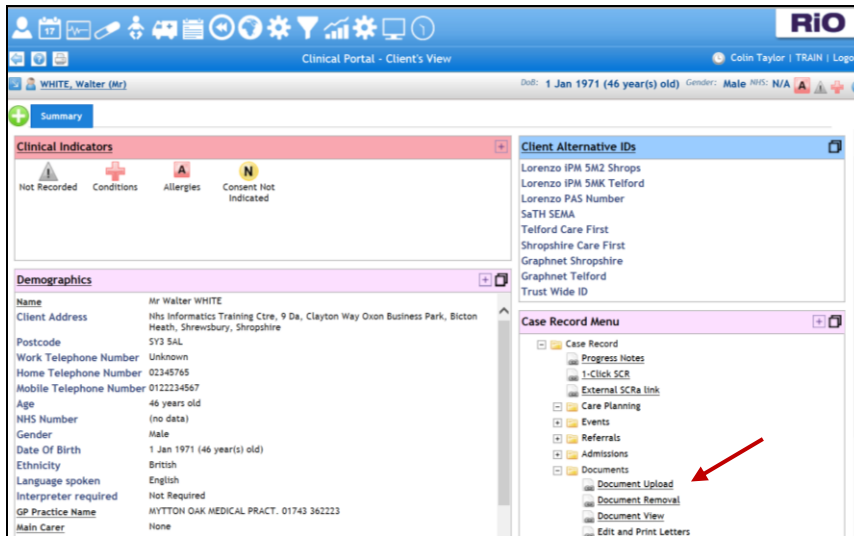
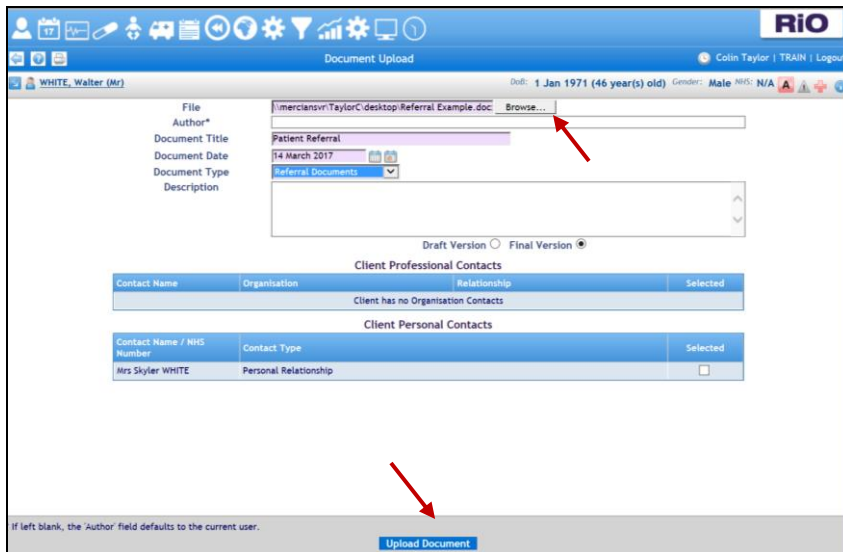


RiO – Uploading Documents



Go to the patient's **Clinical Portal**

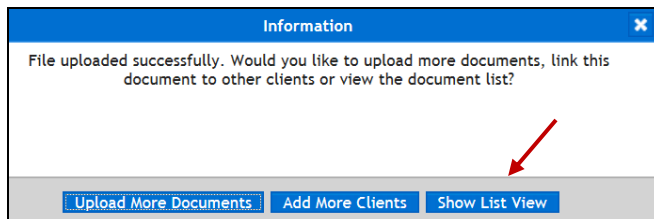
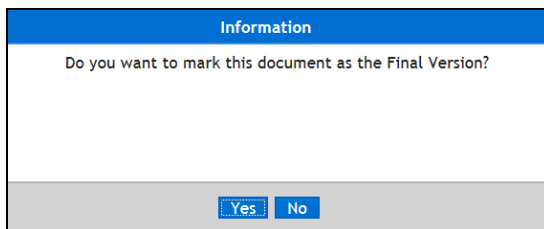
From the **Case Record Menu** panel, click **Document Upload**



Complete fields as appropriate in the **Document Upload** screen

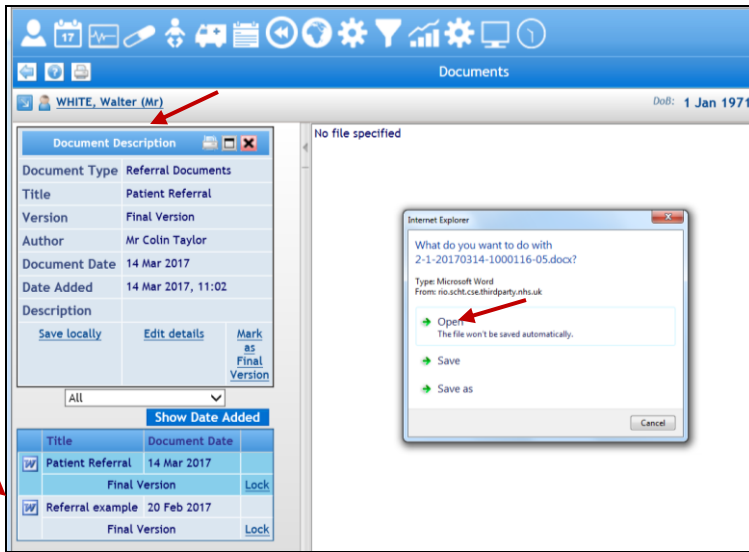
Click **Browse** to select your document to upload

Click **Upload Document**




After answering the first **Information** message, a second **Information** message will appear.

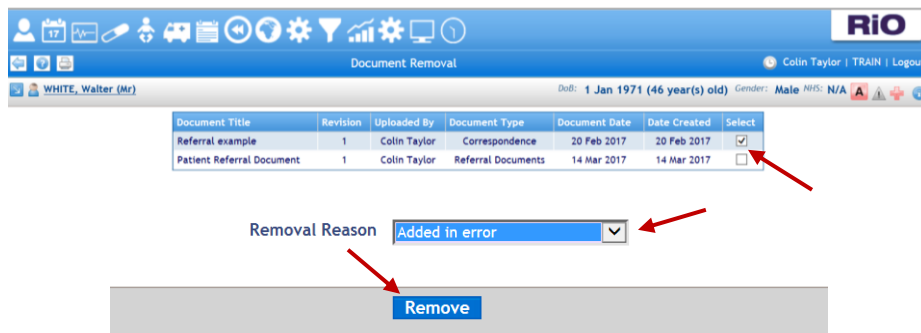
Click **Show List View** if you wish to display a list of your patient's documents



An updated list of patient documents will display

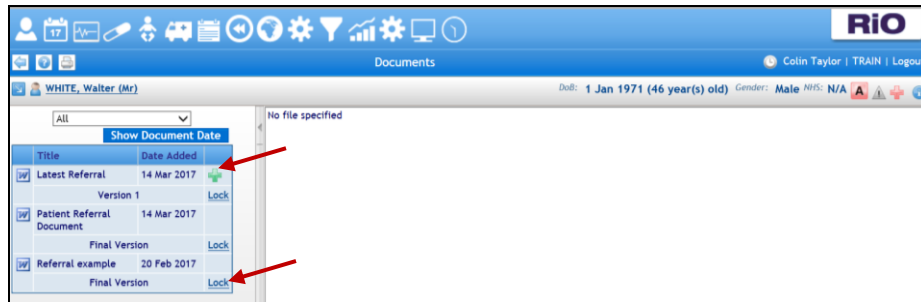
Click the **Word** icon  and click **Open** to the subsequent Internet Explorer message if you wish to view the document

Click **Cancel** on the Internet Explorer message if you wish to select a different action from the **Document Description** box




To remove a document, go to your patient's **Case Record Menu** panel and click **Document Removal**

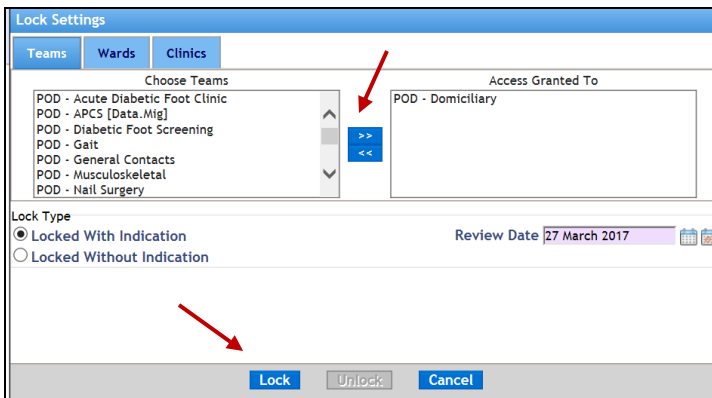
Select the document to be removed In the **Document Removal** screen, select a **Removal Reason** and click **Remove**



If you wish to add a new document and link it to a previously uploaded document, click the **green cross** icon

 and complete the subsequent **Document Upload** screen

N.B this function is not possible if the previous document is a final version

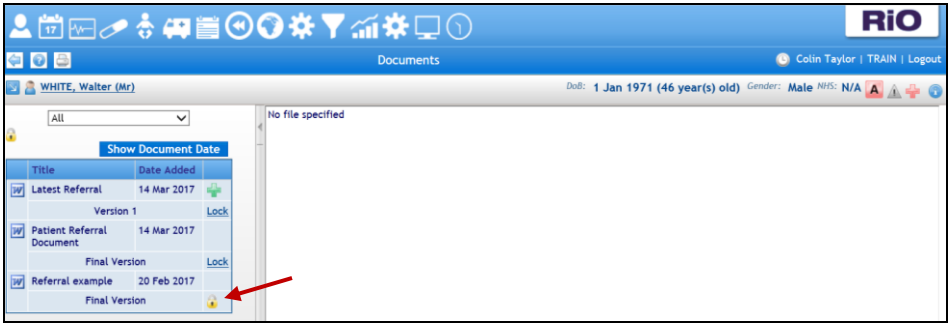


If you wish to restrict who can view a document, click **Lock**

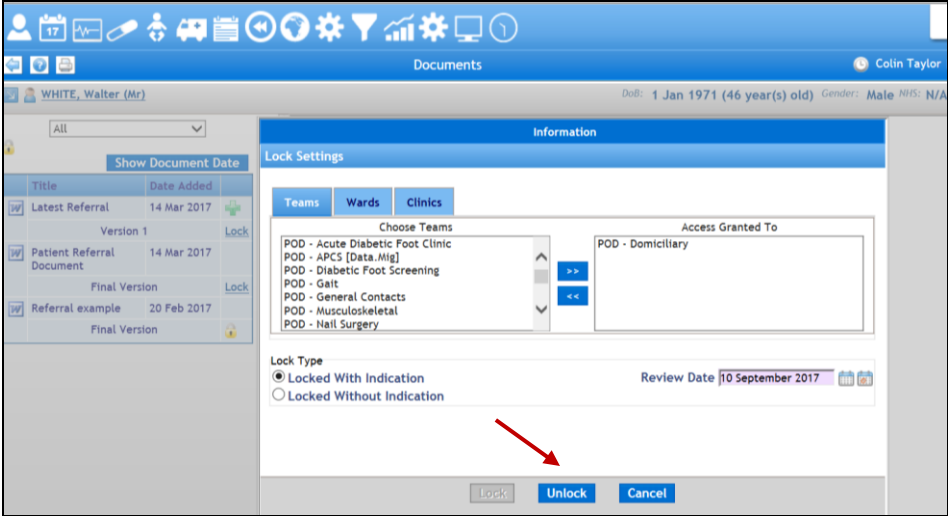
In the **Lock Settings** window, select who will be able to view the progress

note and click the **Select** icon 

Click **Lock**



To un-restrict access to view a document, click the **Lock** icon



In the **Lock Settings** window, click **Unlock**